

San Bernardino BHMIS Phase I End User Training Agenda

CalPM ADT - DBH SUD		
Date:	TBD	
Course Instructor:	TBD	
Duration:	2 Days	
Super User Attending:	TBD	
Location:	TBD	
Roles required to complete:	INSERT ROLES HERE	
Objective		
Objective:		
DAY 1 DATE Time: 8:00AM – 4:30PM		
EST. START/END TIME	TOPIC	NOTES
8:00 – 8:45	Avatar Basics Logging In and Out Navigation of Home View My Forms Clients Widget Navigation of Chart View	
8:45 – 9:15	Initial Contact Log Call Intake Initial Contact Log Assign Permanent Record #	
9:15 – 9:45	Hands on Exercise	Create Four New Clients – Create at Least One Youth
9:45 – 10:00	BREAK	
10:00 – 11:00	SUD Registration Bundle Admission (Outpatient) CalOMS Admission Emergency Contact Information SUD Admission Bundle Diagnosis Sexual Orientation and Gender Identity (SOGI) SUD Financial Eligibility Admission (Outpatient) Financial Eligibility Real Time Inquiry (270) Request	*Possible SUD Financial Bundle
11:00 – 11:30	CalOMS Administrative Discharge Discharge CalOMS Administrative Discharge	
11:30 – 12:00	CalOMS Standard Discharge Discharge	

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	CalOMS (Discharge)	
12:00 – 1:00	Lunch	
1:00 – 1:30	CalOMS Youth Discharge Discharge CalOMS Youth Detox Discharge	
1:30 – 2:45	Hands on Exercise & Open Discussion (Review of SUD Bundle and CalOMS Admin Discharge)	Register their four clients and Financial Discharge the Youth They Created
2:45 – 3:00	Break	
3:00 – 3:15	Client Information Update Client Data Client Condition Pregnancy Client Contacts	
3:15 – 4:30	Hands on Exercise & Open Discussion	Update Client Data on continue earlier Exercise
DAY 2 DATE Time: 8:00AM – 11:45AM		
Estimated Start/End Time	Topic	Notes
8:00 – 9:00	Review of Day 1	
9:00 – 9:45	Ancillary/Ambulatory Services Client Charge Input Recurring Client Charge Input Edit Service information (Adding Emergency Indicator)	
9:45 – 10:15	Client Ledger Simple Report Crystal Report	
10:15 – 10:30	Break	
10:30 – 11:00	Group Management Group Member Listing Edit Group Registration Delete Group Termination	
11:00 – 12:00	Scheduling Calendar Add Appointment Find New Appointment Find Existing Appointment Scheduling Individual Appointments Rescheduling of Appointments Editing Appointments Creating Groups Scheduling Group Appointments Appointment Management Appointment Move/Delete	

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12:00 – 1:00	Lunch	
1:00 – 1:30	Continue Scheduling Calendar	
1:30 – 2:30	Hands on Exercise & Open Discussion	
2:30 – 2:45	Break	
2:45 – 3:00	Scheduling Reports Print Practitioner Reports Print Appointment Reminder Print Schedule	
3:00 – 3:45	Crystal Reports Medi-Cal Eligibility Roster Client Information Face Sheet Report Unit Service Summary by Reporting Unit Missing Social Security Number Report Clinical Summary Statistics Clinic Caseload Summary Statistics Medicare Clients with Current Open Episodes Absence of Service Report Client Registration Analysis Client Coverage Status Direct Service Detail Report Input Verification Report Monthly Client Charges Report Clinic Supervisor Summary Morning Report Monthly Admit Discharge Summary Patient Financial Information Indirect Services Report Registrar Review Report Activity Analysis: Staff Hour Detail Program Caseload Service Summary: Direct and Indirect Services Service Entry Performance Report Primary Staff Active Caseload(SBC100) Missing Social Security Number Report MHS942 Clinic Summary Report	
3:45 – 4:30	Hands on Exercise/Wrap Up	

Specific Training Notes for this Course

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